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ABSTRACT

The Montgomery County Public Schools (Maryland) system has assembled in this document its policies, procedures, criteria, and standards that apply to educational facilities development. The policies it contains are part of a planning process that recognizes the interrelationship of its facilities planning policy with other policies such as those on educational programs and capital modernization/renovation projects. The planning process is designed to promote public understanding of planning for county schools and to encourage community members, local government agencies, and municipalities to identify and communicate their priorities and concerns to the Superintendent and Board of Education. Policy guidelines are presented for facilities planning and construction; naming new facilities; facilities renovation; site acquisition; and facilities development plans. (GR)

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Montgomery County Public Schools

MCPS Policies

Section F: Facilities Development

ED 432 128

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FA Facilities Development Goals
- FAA Long-Range Educational Facilities Planning

FB Facilities Planning
- FBB Planning for Construction Projects
- FBC Modular Construction in School Facilities

FE Facilities Construction
- FEA Construction Change Order Policy
- FEA-RA Change Order for Construction Contracts
- FEC Mandatory Submission of Plans for Major Capital Projects
- FED Policy on Retainage Reduction for Contractors

FF Naming New Facilities (rescinded)
- FFA Naming Schools
- FFA-RA Naming Schools

FK Facilities Renovations
- FKA Air Conditioning Policy
- FKB Modernization/Renovation

FM Site Acquisition
- FMB Elementary School Park Sites
- FMC Street and Road Construction Abutting School Sites

FN Facilities Development Plans
- FNA Policy on Landscaping

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POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: ACD, CFA, JEE, JEE-RA
Responsible Office: Educational Facilities Planning and Capital Programming

Long-Range Educational Facilities Planning

A. PURPOSE

1. The Board of Education has a primary responsibility to provide school facilities that address changing enrollment patterns and that sustain high quality educational programs in a way that meets its policies. The Board of Education fulfills this responsibility through the facilities planning process. The achievement of Success for Every Student through the delivery and execution of an excellent educational program is of primary importance to students and parents in Montgomery County.

2. The Long-Range Educational Facilities Planning (LREFP) policy provides direction on how the planning process should be conducted and prescribes criteria and standards to guide planning. This process is designed to promote public understanding of planning for Montgomery County Public Schools (MCPS) and to encourage community members, local government agencies and municipalities to identify and communicate their priorities and concerns to the superintendent and Board.

3. The Board recognizes the interrelationship of its facilities planning policy with other policies such as those on educational programs, quality integrated education, and capital modernization/renovation projects.

4. The Long-Range Educational Facilities Planning policy also describes the ways in which facilities planning for school sites and school service areas supports the Quality Integrated Education (QIE) policy.

B. ISSUE

Enrollment in MCPS is never static. The fundamental goal of facilities planning is to provide a sound educational environment for a changing enrollment. The number of students, their geographic distribution, and the demographic characteristics of this population all concern facilities planning. Enrollment changes are driven by factors including birth rates, movement within the school system and into the school system from other parts of the United States and from other parts of the world.

Enrollment changes in MCPS do not occur at a uniform rate throughout the county. The MCPS system is among the twenty largest in the country in terms of enrollment and serves a county of approximately 500 square miles. The full range of population density, from

rural to urban, is present in the county. Where new communities are forming, enrollment has been growing faster than in established areas of the county. In areas with affordable housing, there is often greater diversity in enrollment caused by immigration from outside the country.

MCPS is challenged continually to anticipate and provide facilities in an efficient and fiscally responsible way to meet the varied educational needs of students. The Long-Range Educational Facilities Planning policy describes how the school system responds to educational and enrollment change, the rate of change, its geographic distribution, and the racial, ethnic and socioeconomic diversification of enrollment.

School facilities also change. Aging of the physical plant requires a program of maintenance, renovation, and modernization. Acquiring new sites, designing new facilities, and modifying existing ones so that they keep current with program needs is essential. This policy provides the framework for coordinating planning for these capital improvements.

C. POSITION

The following procedures, criteria, and standards apply to the facilities planning process.

1. *Capital Improvements Program (CIP)* - On or about November 1, the superintendent will publish recommendations for a capital budget and improvements program. The Capital Improvements Program schedules needed changes to the MCPS physical inventory for the coming six fiscal years.

    a) After review of the superintendent's recommendations for a capital budget and six-year CIP, the Board will adopt a capital budget and a six-year CIP and submit them to the county executive for review and recommendations to the County Council for inclusion in the county CIP and for funding of upcoming fiscal year projects. The superintendent will notify PTA/PTSAs, municipalities, civic groups registered with the Maryland-National Capital Park and Planning Commission, student government associations, and other interested groups of its publication and availability in public libraries. The proposed CIP will be sent for review and comment to the Maryland-National Capital Park and Planning Commission, State Board of Education, State Interagency Committee on Public School Construction, county government, municipalities, MCCPTA, Montgomery County Region of the Maryland Association of Student Councils, and Montgomery County Junior Council. The six-year CIP will include:

        (1) Background information on the enrollment forecasting methodology

        (2) Current enrollment figures and demographic profiles of all schools including racial/ethnic composition, Free and Reduced Meals program participation, English for Speakers of Other Languages (ESOL) enrollment, and school mobility rate

(3) Enrollment forecasts for the next six years by year, and longer term cluster forecasts for a period approximately ten and fifteen years into the future

(4) A profile of all school facilities showing physical and program characteristics, such as Head Start, kindergarten and pre-kindergarten, ESOL, and special education centers

(5) A summary of any capital requests by the Board of Education that would change the facility, as well as Board actions affecting programs at the facility or the service area of the facility (When necessary, supplements to the CIP may be published to provide more information on issues.)

(6) Montgomery County Project Description Forms for all requested capital projects (A project description form describes the needs for a particular facility or for several facilities with similar requirements and contains the project budget.)

b) The county executive and County Council are required to adopt a six-year capital improvements program (CIP) which includes MCPS projects, reporting construction schedules, and anticipated costs. This document includes:

(1) A statement of the objectives of MCPS capital programs and the relationship of these programs to the long-range development plans adopted by the county

(2) Recommended capital projects and a proposed construction schedule for schools and other educational facilities

(3) An estimate of cost and a statement of all funding sources

(4) All anticipated capital projects and programs of the Board including substantial improvements and extensions of projects previously authorized

2. Master Plan

a) On or about June 15 of each year the superintendent will publish a summary of all Board-adopted capital and non-capital facilities plans. This document, called the *Master Plan for Educational Facilities*, is required under the rules and regulations of the State Public School Construction Program.

(1) This comprehensive plan will incorporate the impact of all capital projects approved for funding by the County Council and any non-capital facilities plans approved by the Board of Education.

(2) The *Master Plan for Educational Facilities* will show projected enrollment and utilization for facilities for the next six years and for a period approximately 10 and 15 years in the future. This information will reflect projections made the previous fall as updated in spring, and any changes in enrollment or

capacity projected to result from capital projects, boundary adjustments or other changes authorized by the Board prior to the date of the plan's publication.

(3) The plan will include demographic profiles of school enrollments and physical and program profiles of school facilities.

b) Schools that fail to meet one or more of the facility standards for enrollment and utilization based on projections will be identified in the Master Plan. The *Master Plan for Educational Facilities* serves as the review and reporting mechanism required by this policy.

3. Enrollment Forecasts

a) Each fall enrollment forecasts for all schools will be developed for a six-year period. In addition, longer term forecasts for a period of approximately ten and fifteen years in the future also will be developed. These forecasts will be the basis for evaluating facility space and initiating planning activities. The forecasts should be developed in coordination with the Montgomery County Planning Department's county population forecast and any other relevant planning sources.

b) On or about April 1, a revision to the enrollment forecast for the next school year will be developed to refine the forecast for all schools and to reflect any change in service areas or programs.

4. Capacity Calculations

a) The capacity of a facility is determined by the space needs of educational programs. The capacity ratios shown in the following table should not be confused with staffing ratios as determined through the operating budget process. Program capacity is calculated as the product of the number of teaching stations at a school according to the following ratios:

Level	Capacity Ratings Per Room	
Head Start & Pre-K	36:1	(2 sessions per day)
Grade K ½ day	44:1	(2 sessions per day)
Grade K all day	22:1	
Grades 1-6 Elementary	25:1	
Grades 6-12 Secondary	25:1*	
Special Ed. Intensity 4	13:1	
Special Ed. Intensity 5	10:1	
ESOL/SPARC/BASIC	15:1	

* Program capacity differs at the secondary level in that the regular calculated capacity of 25 is multiplied by .9 to reflect the optimal utilization of a secondary facility.

Some special programs require classroom ratios different from those listed.

Maximum class size for preschool and special education programs is mandated by state and federal regulations.

b) Elementary, middle, and high schools should operate in an efficient utilization range of 80 to 100 percent of program capacity. If a school is projected to be underutilized (less than 80%) or overutilized (over 100%), facilities planning to address these utilization levels may be undertaken. In the case of overutilization, an effort to judge the long-term needs for permanent space should be made prior to planning for new construction. Temporary measures such as the use of relocatable classrooms may be appropriate. Underutilization of facilities also should be evaluated in the context of short-term and long-term enrollment forecasts.

5. Preferred Range of Enrollment

The description of preferred ranges of enrollment for schools refers to all students, except those special education students receiving instruction in self-contained classrooms, whose numbers are added to these ranges.

a) A preferred range of enrollment for schools, provided they have program capacity, is:

(1) Two to four classes per grade of students in an elementary school

(2) Two to three teams per grade in middle schools with team size averaging between 100 to 125 students

(3) 250 to 450 students per grade in high schools

(4) Enrollment as set forth in applicable education policies for the K-12 program

b) The preferred range of enrollment will be considered when planning new schools or changes to existing facilities. Departures from the preferred range may occur if educational program justifies or requires it. Larger enrollments for high schools may be justified for those schools in which students are academically very diverse in order to meet the programmatic needs of all students. Fiscal constraints may also require MCPS to build schools of other sizes. If larger or smaller schools are built or created, alternative approaches to school construction, management, organization, or staffing will be considered in order to facilitate effective delivery of educational programs.

6. School Site Size

Size for school sites are:

a) 12 usable acres for elementary schools

b) 20 usable acres for middle schools

c) 30 usable acres for high schools

Sites of these approximate sizes accommodate the instructional program including related outdoor activities. In some circumstances it may be necessary to use smaller or larger sites. In these circumstances special efforts to accommodate outdoor activities are necessary such as use of adjacent or nearby park properties or shared use of school fields. It may be necessary to acquire more than the standard acreage in order to accommodate environmental concerns, unusual topography, or surrounding street patterns.

7. Community Representation

Members of the community have several opportunities for direct input into the facilities decision-making process including: actual participation as voting or non-voting members of advisory committees, submission of letters, alternatives, or other written material for consideration by the superintendent and staff; and testimony in written or oral form before the Board of Education. In addition, the views of the members of the community are solicited through:

- the Montgomery County Council of PTAs which is the largest group seeking views of school communities affected by facility planning activities
- cluster coordinators
- local PTAs
- student advocacy groups
- other organizations

a) PTA or other parent and student representatives along with appropriate MCPS facility and program staff should be involved in the facility planning process for site selection, school boundary studies, school closings and consolidations, and aspects of facility design (including modernization planning, new school planning, and architect selection).

b) In addition to parent and student representation, MCPS employees, municipalities, local government agencies, civic and homeowner associations, and countywide organizations contribute to the facilities planning process. A civic or homeowner association must be registered with the Maryland-National Capital Park and Planning Commission. Countywide organizations are those with

members throughout the county, including organizations such as the League of Women Voters, and federations of civic groups.

c) The Board will conduct public hearings for potentially affected school communities prior to any action affecting attendance areas and the closure or consolidation of schools.

(1) Public hearings will be conducted following publication of the superintendent's recommended budget and six-year capital improvements program in November.

(2) Public hearings also may be held in March for any capital budget recommendations deferred from the fall or in cases where capital decisions must be made in March.

(3) Written comments from interested parties will be accepted at any point, but in order to be considered comments must reach the Board 24 hours before the time scheduled for action by the Board.

D. DESIRED OUTCOMES

This policy is intended to achieve the following outcomes:

1. Provide the facilities and future school sites necessary to sustain high quality educational programs at reasonable cost, including non-traditional facilities where these provide needed educational programs

2. Utilize schools in ways that are consistent with sound educational practice. Consider the impact of facility changes on educational program and related operating budget requirements and on the community

3. Provide opportunities for all students in accordance with the Board policy on Quality Integrated Education

4. Provide space to accommodate all students, where feasible, in their home schools

5. Provide a schedule to maintain and modernize older school buildings in order to continue their use on a cost-effective basis, and to keep facilities current with educational program needs

6. Provide a capital program and master plan that consider long-term enrollment trends, educational program needs, and capacity available over a broad region in determining:

a) Where and when new schools and additions will be constructed

b) Where and when school closures and consolidations are appropriate

7. Provide a meaningful role for the community in facilities planning

8. Provide as much stability in school assignments as possible

   a) Provide high schools for Grades 9-12 and, where possible, create clusters composed of one high school, and a sufficient number of elementary and middle schools, each of which send all students including special education and ESOL students, to the next higher level school in the cluster.

   b) Efficient utilization of resources and facilities may require shared use of facilities by more than one cluster.

E. IMPLEMENTATION STRATEGIES

1. Evaluating Utilization of Facilities

   a) In the fall of every year after new enrollment forecasts are developed, utilization of all school facilities will be evaluated. The effect of any proposed educational program changes or grade level reorganizations also will be evaluated. For schools that are projected to have insufficient capacity, excess capacity or other facility issues in the future, the superintendent will recommend:

      (1) A capital project in the six-year CIP

      (2) A solution such as boundary change, school pairing, facility sharing, closing/consolidation, or any other similar solution which does not necessarily involve a capital project

      (3) No action or deferral pending further study of enrollment or other factors

   b) Facility recommendations made by the superintendent will incorporate consideration of educational program impacts. As part of the process of developing facility plans, facilities planning staff will work closely with appropriate program staff to identify program requirements for facility plans.

   c) Recommendations that relate to school boundary changes will be made after the superintendent receives advice from a school boundary advisory committee.

   d) The superintendent also may request advice from the school community for other types of facility recommendations, such as school closures and consolidations, grade level reorganizations, pairings and program moves.

2. Guidelines For Development of Facilities Recommendations

   In cases where enrollment change requires the opening of additional facilities, or any other change in student assignments, a number of factors are to be taken into consideration by the Board of Education, the superintendent, and any advisory

committee.

a) Area of Focus: Facility

(1) Facilities proposals should result in school utilizations in the 80% to 100% efficient range whenever possible.

(2) Proposals should be fiscally responsible and consider ways to minimize capital and operating costs whenever feasible. The geographic scope of facility studies should be broad enough to realize economies in costs and comprehensive long-range solutions to facility issues while preserving as much stability in school assignments as possible.

(3) When the Board of Education moves special education programs, physical modifications to the facility will be made in accordance with the Americans with Disabilities Act (ADA).

(4) Shared use of a facility by more than one cluster may be the most feasible facility solution in some cases. In these cases, not less than 25% of the shared school's enrollment should come from each cluster.

b) Area of Focus: Population

(1) New school openings and boundary adjustments demand that consideration be given to the impact of various proposals on the affected school populations. A school population consists of students assigned from a specific geographic attendance area regardless of the location of the school building itself.

(2) Where reasonable, school service area boundaries should be established to promote creation of a diverse student body in each of the affected schools considering the county's different racial/ethnic groups in accordance with the Quality Integrated Education policy; the socioeconomic background of students as measured by participation in the Free and Reduced Meals Programs (FARMs), U.S. Census information, and other reliable indicators; the inclusion of special education programs and students; mobility rates at schools; and the mix of single family and multiple family dwellings within each service area. Data showing the impact of proposals on applicable factors shall be developed.

c) Area of Focus: Geography

(1) In most cases, the geographic scope of elementary school boundary studies should be limited to the high school cluster area. For secondary schools, one or more clusters of schools may be studied.

(2) Consistent with the school system policy on Site-Based Participatory Management, with its emphasis on community involvement in schools,

boundary proposals should result in service areas that are, as much as practical, made up of contiguous communities surrounding the school. Walking access to the school should be maximized and transportation distances minimized when other priorities do not require otherwise.

d) Area of Focus: Stability

(1) Recognizing that at times changes to facilities and boundaries may occur, plans should result in as long a period as possible of stable assignment patterns.

(2) Recommendations for aggregate student reassignments should consider recent boundary changes and/or school closings and consolidations which may have affected the same communities.

3. Calendar

The long-range facilities planning process will be conducted according to an annual calendar that will adhere to the following calendar adjusted annually to account for holidays and other anomalies.

School principals, cluster coordinators, and PTA representatives meet with facilities planning and other appropriate staff and exchange information about facilities issues requiring consideration in upcoming CIP's	Late May
Superintendent publishes a summary of all actions to date affecting schools (Comprehensive Master Plan) and identifies future needs	June 15
Cluster PTA representatives submit comments and proposals about issues affecting their schools to superintendent	July 15
Staff presents enrollment trends and planning issues for Board of Education information	September 30
The County Council passes spending affordability guidelines that set limits on bonding debt the county can undertake	Early October
Superintendent publishes and sends to the Board of Education and county executive Capital Budget and Six-Year Capital Improvements Program (CIP) with recommendations for capital projects, and any boundary changes, reorganizations or other facility plans as appropriate for changing enrollments, programs, and policies	November 1

Board of Education holds worksession on CIP recommendations. Alternatives to recommendations may be requested by Board of Education at this time	Early November
BOE holds public hearings on recommendations and any Board adopted alternatives	Mid-November
Board of Education acts on CIP and any related facility planning recommendations	End of November
County Executive and Montgomery County Planning Board receive Board of Education adopted CIP for review	December 1
County Executive transmits recommended CIP to County Council	January 15
Planning Board reviews County Executive's recommended CIP	February 1
County Council holds public hearings on CIP	February - March
County Council reviews Board of Education requested and County Executive recommended CIPs	March - April
Deferred facility planning issues published with superintendent's recommended amendment(s) to CIP for Board of Education review	February 15
Board holds worksession, requests any alternatives	March 1
Board holds public hearings	March 15
Board acts on deferred recommendations	March 30
County Council approves CIP	June 1

In the event the Board of Education determines that an unusual circumstance exists, the superintendent will establish a different and/or condensed time schedule for making recommendations to the Board, for scheduling public hearings on recommendations for alternatives not previously subject to public hearing and for Board action.

4. Community Involvement Process

School and community involvement in MCPS facilities plans is important to the success of the plans. Parents, staff, and students are primary constituents in the facilities planning process. The county network of Parent Teacher Associations (PTAs), organized in each high school area by cluster coordinators, is the focus for involvement of the school communities. Coordination with municipalities and local government agencies also is appropriate. Information from other community organizations and individuals also is important.

The following sections describe the community involvement process in site selection, boundary changes, and in planning and design of new and modernized facilities.

These sections refer to formation and operation of advisory groups. In addition to these activities all community members have opportunities to advise the superintendent and Board annually through cluster reports, written correspondence, and public testimony.

a) Site Selection

(1) MCPS staff will work with the Montgomery County Planning Board during the development of master plans to identify future school site requirements based on existing and proposed residential development. General or floating locations of sites are identified on master plan maps. As subdivision occurs, site dedications may be requested.

(2) Specific site selection begins when MCPS projections indicate a new facility is required. The facility in most cases will be programmed in the six year CIP before a site selection committee is formed.

(3) The MCPS site administrator works with the cluster coordinators in consultation with PTA presidents to form site selection committees composed of MCPS staff, PTA representatives, and appropriate municipal and county government agency officials. In cases of secondary school sites, representatives of more than one cluster may be involved in the committee.

(a) The MCPS site administrator and planning staff work with the committee reviewing alternative site options from the MCPS inventory, and in some cases study potential purchase of properties.

(b) The committee considers the geographic location, its relation to future student populations, the appropriateness of potential sites and makes a recommendation to the superintendent.

(4) The superintendent evaluates this recommendation and then makes his/her recommendation to the Board.

(5) The Board considers the committee and superintendent's recommendation before officially adopting a site.

b) Facility Design

(1) Parent and student representatives will serve with MCPS staff on planning advisory committees to modify, modernize, or construct new facilities.

(a) Parent representatives will be identified by cluster coordinators in consultation with PTA presidents in coordination with school principals.

(b) Student representatives at the secondary level will be identified by the principal or chair of the committee.

(c) Representatives of adjacent homeowner, civic association, or other neighborhood groups also may serve on the advisory committee.

(2) Activities incorporating community viewpoints include development of educational specifications for schools, architect selection and review of architectural plans.

(a) Architectural plans should be available for review by homeowner and civic associations adjacent to the school site.

(b) Whenever possible, concerns of these groups should be addressed at the design stage before architectural plans are finalized.

c) School Boundary Changes

(1) In cases where MCPS facilities planning staff identify the need for possible changes in school service areas, an advisory committee will be formed to assist in the development of those changes. MCPS facilities planning staff and program staff will organize and work directly with this group.

(a) The cluster coordinator(s) in consultation with the school principal(s) and PTA presidents will identify parent representation from areas potentially affected by boundary changes.

(b) At the secondary level, the school principal(s) will identify interested students to serve on the committee.

(c) The cluster coordinator(s) in consultation with the school principal(s) and PTA presidents also will identify any additional representatives from organized parent or student organizations who have knowledge of the schools involved.

(2) At the outset of meetings, the committee will provide guidelines, criteria, or priorities based on the factors outlined in the section of this policy titled "*Guidelines For Development of Facilities Recommendations*" (Section E.2) to planning staff for consideration in developing options. The superintendent and Board of Education also will consider factors outlined in Section E.2 in their review of boundary proposals.

(3) Staff will then develop and present viable options for the advisory committee to consider. An iterative process of modification to options may follow, directed by the members of the advisory committee. MCPS planning staff will provide data needed to develop entirely new options if the committee determines it wishes to develop its own options.

(4) Official membership on school boundary advisory committees will consist of individuals who are familiar with the affected school communities.

(5) Advisory committees may call on other community resources such as civic and homeowner associations.

(6) Membership on advisory committees should reflect the racial/ethnic and socioeconomic diversity of the area.

(7) MCPS staff will notify civic and homeowner associations in the potentially affected communities of proposed boundary changes being discussed in an area. Cluster coordinators and PTAs may also assist in notification of planning activities through their membership communication mechanism.

(8) An advisory committee report including recommendations or other forms of information from advisory committees will be forwarded to the superintendent.

(9) The superintendent will develop recommendations after considering staff advice, the advisory committee report, if any, and input from other organizations and individuals who have provided comments. The superintendent will publish his/her recommendations about November 1, with the CIP.

(10) Copies of the recommendations are distributed to the affected communities.

(11) The Board of Education will hold a worksession and may request by majority vote that alternatives to the superintendent's recommendations be developed for official review. Any significant modification to the superintendent's recommendation requires an alternative. Any modification that impacts any or all of the school community that has not previously been included in the superintendent's recommendation should be considered a significant modification.

(12) Recommendations from the superintendent and Board-adopted alternatives will be the subject of public hearings prior to final Board action.

(13) Upon taking action on a boundary proposal, the Board has the discretion to adopt minor modifications to the superintendent's recommendation or Board-adopted alternatives if it has been determined by a majority vote of the Board that this action will not have a significant impact on a plan that has received public review. To the greatest extent possible, alternatives will not be considered after the Board of Education alternatives worksession without adequate notification and opportunity for comment to the affected communities.

d) Cluster Reports

(1) By July 15, cluster representatives should state in writing to the superintendent any proposals, priorities, or concerns that the cluster has

identified for its schools.

(2) The cluster may amend its views by September 15 in cases where fall enrollments or other events may change cluster comments.

(3) Cluster reports are to be considered in facilities recommendations made by the superintendent in the subsequent capital improvements program (published November 1).

e) Public Hearing Process

(1) Public hearings usually scheduled for mid-November are open to the potentially affected public and are held annually following publication of the superintendent's recommended CIP. This document incorporates any boundary changes and school closure/consolidations that may also be recommended.

(a) The PTA cluster coordinator in consultation with the PTA president will coordinate testimony at the hearing on behalf of cluster schools.

(b) Civic groups, municipalities and countywide organizations should contact the Board of Education office to schedule testimony.

(c) Public comments from individuals not represented by school or civic groups will be heard by the Board of Education at an appropriate place in the public hearing. Individuals should contact the Board Office to schedule testimony.

(2) Written comments from any interested parties will be accepted at any point, but in order to be considered comments must reach the Board 24 hours before the time scheduled for action by the Board.

(3) Public hearings may also be held on any CIP or facilities planning issues deferred from the fall. These usually would occur in late February or early March. In unusual circumstances public hearings may be called at other times to consider facility issues that do not fit into the fall or spring timetables.

5 School Closures and Consolidations

The Maryland State Board of Education requires all school systems to consider certain factors and follow set procedures in cases where a school closure is contemplated. The procedures described below are in accordance with those requirements and the guidelines as outlined in this Board of Education policy.

a) The following information on each school that may be affected by a proposed closing shall be prepared and analyzed:

(1) Student enrollment trends

(2) Number of transfers into school from outside attendance area

(3) Race/ethnic composition of student body

(4) Educational programs at schools

(5) Age or condition of building

(6) Review of school's location and site characteristics

(7) Building characteristics, including any modifications for special programs

(8) Physical condition

(9) Financial considerations including operating costs

(10) Feeder pattern

(11) Percentage of students transported

(12) Potential of the facility for alternative use

(13) Student relocation

(14) Impact on community in geographic attendance area for school proposed to be closed and school, or schools, to which students will be relocating

Copies of the data are also to be sent to affected schools' principals and community representatives.

b) In conjunction with requirements, the superintendent shall provide an analysis of each school's current and projected enrollment given the enrollment and facility standards described in this policy and analysis of the impact of closure/consolidation options on racial/ethnic balance and objectives of the QIE policy.

c) Recommendations for closure or consolidation should move schools toward standards for enrollment and facility utilization and should represent fiscally responsible and educationally sound responses to changing enrollment. Recommendations should be consistent with the Board's policy on Quality Integrated Education. They should enable as many students to walk to school as possible, and minimize transportation distances except when transportation or longer distances are required to address racial and ethnic isolation.

d) The community's role in the process shall be as follows:

(1) The superintendent shall request formation of a community advisory committee to provide input prior to making any recommendations. Procedures for operation of advisory committee found in Section E.4c (on boundary changes) shall be followed in instances where school closures/consolidations are being considered.

(2) The superintendent shall publish recommendations for school closures and consolidations by November 1. After providing recommendations to the Board of Education, copies are to be sent for review and comment to the M-NCPPC, State Board of Education, State Interagency Committee, County Council, municipalities, county government, MCCPTA and all affected school PTAs and cluster coordinators.

(3) Individuals, schools, and/or community organizations may react to the recommendations for their school within two months after they are distributed. All reactions and community-developed proposals will be shared with the Board.

(4) If an individual or community group wishes to develop an alternative proposal affecting its school and others in the area, it should involve representatives of all school communities affected by the recommendations or make efforts to secure such representation. Any community plans should be sent to the superintendent within two months after the recommendations are distributed.

(5) The superintendent shall develop formal recommendations after considering individual and community reactions and alternatives and submit them to the Board of Education by February 1.

(6) If the Board chooses to request alternatives to the superintendent's formal recommendations, affected communities will be informed about them promptly.

(7) Subsequent to these steps, the Board's prescribed process for public hearing shall be followed. (see Section E.4e) In addition, state requirements for adequate notice to parents and guardians of students in attendance at all schools being considered for closure by the local board of education will be followed. In addition to any regular means of notification, written notification of all schools that are under consideration for closing shall be advertised in at least two newspapers having general circulation in the geographic attendance area for the school or schools proposed to be closed, and the school or schools to which students will be relocating.

(8) The newspaper notification shall include the procedures that will be followed by the local board of education in making its final decision. Time limits on the submission of oral or written testimony and data shall be clearly defined in the notification of the public meeting. The newspaper notification shall

appear at least two weeks in advance of any public hearings on a proposed school closing. The Board reserves the right to solicit further input or to conduct further hearings if it considers them desirable.

(9) In making its decision, the Board shall take into account the superintendent's recommendations and the criteria outlined in this policy.

(10) The final decision of the Board of Education to close a school shall be announced at a public session and shall be in writing. The final decision shall include the rationale for the school closing and address the impact of the proposed closing on the factors set forth above in this policy. There shall be notification of the final decision of the local board of education to the community in the geographic attendance area of the school proposed to be closed and school or schools to which students will be relocating. The final decision shall include notification of the right to appeal to the State Board of Education.

(11) Except in emergency circumstances, the decision to close a school shall be announced at least 90 days before the date the school is scheduled to be closed but not later than April 30 of any school year. An emergency circumstance is one where the decision to close a school because of unforeseen circumstances cannot be announced at least 90 days before the date a school is scheduled to close or before April 30 of any school year.

F. REVIEW AND REPORTING

1. The annual June publication of the Master Plan will constitute the official reporting on facility planning. This document will reflect all facilities actions taken during the year by the Board of Education and approved by the County Council, project the enrollment and utilization of each school, and identify schools that may be involved in future planning activities.

2. This policy will be reviewed every three years in accordance with the Board of Education's policy review process.

Policy History: Adopted by Resolution No. 257-86, April 28, 1986; amended by Resolution No. 271-87, May 12, 1987; amended by Resolution No. 831-93, November 22, 1993; amended by Resolution No. 679-95, October 10, 1995.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FBA

Planning for Construction Projects

A. PURPOSE

To underscore the necessity for budgeting planning funds for construction projects one year prior to construction funds

B. PROCESS AND CONTENT

1. It is intended that all new school facilities planned for a given school year should be available for occupancy on September 1.

2. Experience has shown that the time required for planning, design, bidding, and construction of a new elementary school normally requires 16 to 18 months under favorable circumstances, and longer when unforeseeable delays intervene, so that it has not proved feasible to construct all new elementary schools budgeted for a given year for occupancy by September 1 following.

3. Experience has shown that the planning, design, bidding, and construction of new secondary schools or of large additions to secondary schools, normally requires more time than now scheduled, particularly when unforeseeable delays intervene.

4. Because it is desirable and economical to space construction projects at different starting times throughout the year and for the reasons outlined above, where appropriate, planning funds for the construction of new elementary and secondary schools and for large additions to secondary schools should be budgeted one year in advance of construction funds. The County Council should be advised immediately of this action and the necessity therefore.

C. REVIEW AND REPORTING

This policy will be reviewed every three years in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 736-61, November 27, 1961; reformatted by Resolution No. 333-86, June 12, 1986, and Resolution No. 458-86, August 12, 1986, and accepted by Resolution No. 209-91, February 25, 1991

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FBA, KGC, KGC-RA
Responsible Office:

Modular Construction in School Facilities

A. PURPOSE

To establish guidelines on the use and application of modular construction for new and existing schools.

B. PROCESS AND CONTENT

1. *Modular construction* is a term generally applied to a building or portion of a building that is built by units to standard dimensions. The units typically are assembled off-site in a closed building and transported to a designated site. They are outfitted with self-contained mechanical, electrical, and structural systems.

2. Modular construction decisions will be made on an individual project basis by the Board as a part of review and action on the Capital Improvements Program.

3. All proposals for modular construction will include an assessment of the following:

   a) Initial capital outlay, annual operating, relocation, and restoration expenses

   b) Proximity of existing and proposed schools

   c) Assessment of the length of time the unit likely will be needed, based on projected enrollments

   d) Neighborhood characteristics that have potential to significantly alter school enrollments

C. REVIEW AND REPORTING

This policy will be reviewed every three years in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 312-90, May 8, 1990.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FEA-RA
Responsible Office:

Construction Change Order Policy

A. PURPOSE

To specify th[illegible] authority for the approval of construction contract change orders.

B. PROCESS AN[illegible] CONTENT

1. All chan[illegible] schools t[illegible] Board of Education for approval.

2. All chan[illegible] schools [illegible] orders w[illegible]

   a) Pro[illegible] Boa[illegible]

   b) Aut[illegible] con[illegible]

   c) Ext[illegible] the contract completion date.

   d) Sign[illegible] con[illegible] Usually, after the design or extent of facilities provided for in the original contract documents.

3. Board o[illegible] Education approval must be obtained for all change orders which would alter cor[illegible] facts as indicated in Items 2.a) through d) above.

4. The sup[illegible] superintendent's designee will forward a copy of all change orders to the State Interage[illegible]y Committee for Public School Construction (IAC) for approval if state funds ar[illegible] involved.

C. REVIEW AND[illegible] REPORTING

This policy w[illegible] *It be reviewed every three years in accordance with the Board of Education* policy reviev[illegible] *process.*

Policy History: Ado[illegible]ed by Resolution No. 861-73, July 23, 1973; amended by Resolution No. 935-83, November 8, 1983; reformatted by Resolution No. 458-86, August 12, 1986; and Resolution No. 210-90, February 25, 1990; accepted and amend[illegible]

REGULATION MONTGOMERY COUNTY PUBLIC SCHOOLS

Related Entries: FEA
Office: Associate Superintendent for Supportive Services
Department of School Facilities

Change Order for Construction Contracts

I. Changes which may be required after a construction contract has been awarded must be approved in accordance with state regulations and the policy of the local Board of Education. This regulation sets forth the procedures for initiating, approving, and reporting change orders for construction contracts.

II. The director of school facilities is responsible for ensuring that the Board of Education policy covering contract change orders and the procedures outlined below are properly implemented.

A. Initiating and Processing a Request for a Change Order

1. Using MCPS Form 230-36, Construction Contract Change Order, as appropriate, the need for a change order may be initiated, following consultation with the MCPS project inspector, by the general contractor, architect/engineer, or MCPS school facilities staff.

2. All change order requests are reviewed by the project architect/engineer who will ensure that the following information is included:

a) A description and justification for the requested change(s) in relation to the original bid specifications

b) Documentation, as required, of the subcontractors' itemized costs and/or credits

c) The general contractor's summary of total costs and/or credits to effect the change order

d) The basis for any requested change in the contract completion date

3. The project architect/engineer examines the requested change order to determine that the request is justified and reasonable and that the information provided is

accurate and submits his recommendation to the director of construction and capital projects.

B. Approving a Change Order

The director of construction and capital projects is responsible for ensuring that change orders were approved by the appropriate official or agency as required below and for discussing with the director of school facilities any unusual change order recommendations before final action is taken.

1. Director of Construction and Capital Projects – The director of construction and capital projects is authorized to approve change orders for $5,000 or less unless the change order:

   a. Provides facilities not included in the standards for facilities as approved by the Board of Education;

   b. Authorizes any alterations specifically excluded by the terms of the original contract;

   c. Extends the contract completion date;

   d. Significantly alters the design or cause a facilities specified in the original contract documents;

   e. Is judged to be excessively costly;

   f. Is not acceptable to both the director of construction and the project architect/engineer;

   g. Results in the number of change orders for a project being determined as excessive.

2. The director of school facilities approves a change order for $5,000 or less when any of the factors outlined in 1 e through 1 g above apply.

3. Board of Education – A change order in excess of $5,000 or a change order which would significantly alter a contract as defined by items 1 a) through 1 d) above is submitted by the superintendent to the Board of Education for appropriate action.

4. State Interagency Committee – All change orders considered eligible are submitted to the State Interagency Committee for approval if state funds for construction are involved.

5. The director of construction and capital projects is responsible for ensuring that all approved change orders are made a part of the contract.

C. Reporting Change Orders

1. All approved change orders involving state funds for construction are reported to the State Interagency Committee by the director of construction and capital projects via the monthly state reports signed by the director of school facilities.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FEA, FEA-RA, FEB

Mandatory Submission of Plans for Major Capital Projects

A. Purpose

Section 7-112 of Article 28, *Annotated Code of Maryland* requires that the Montgomery County Public School submit plans for the construction of school facilities to the Montgomery County Planning Board for comment prior to project construction. It is the intent of the school system to cooperate fully with the Planning Board staff to efficiently and effectively provide the best possible educational facilities in an adequate and timely manner by minimizing duplication of effort and undue delays.

B. Process and Content

1. Subsequent to approval of preliminary plans for major capital projects by the Board of Education, the superintendent of schools will submit those plans to the Montgomery County Planning Board for its review under mandatory referral.

2. In accordance with State law, "The failure of the Commission to act within 60 days from and after the date of official submission to it shall be deemed an approval, unless a longer period be granted by the submitting board, body, or official."

3. The superintendent of schools will review the Planning Board's comments and either adopt or eject each recommendation. A summary of the superintendent's actions will be provided to the Board of Education.

4. Recommendations involving school board policy will be brought to the attention of the Board of Education prior to final response from the superintendent.

5. Montgomery County Public Schools will continue to submit school facility construction plans, as appropriate, to all other agencies as required by applicable law and procedure.

C. Feedback Indicators

The Board of Education will receive updates on the status of projects submitted to the Planning Board under the mandatory referral provisions of Article 28, Section 7-112, *Annotated Code of Maryland*.

Resolution 206-86, March 24, 1986.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries:
Responsible Office:

Policy on Retainage Reduction for Contractors

A. PURPOSE

To set forth policy guidelines for reduction of retainage on capital construction projects

B. PROCESS AND CONTENT

The retainage on capital projects may be reduced, with Board approval, from 10 percent to five percent when:

1. A project is, at a minimum, 80 percent completed and is scheduled to be finished within the contract completion date
2. The project architect recommends in favor of the contractor's request for reduction of retainage
3. The reduction is approved by the contractor's surety agent

C. REVIEW AND REPORTING

This policy will be reviewed every three years in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 607-89, October 10, 1989.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FFA-RA
Responsible Office: Deputy Superintendent for Planning, Technology, and Supportive Services
Facilities Management

Naming Schools

A. PURPOSE

To establish an equitable process by which the Board of Education can assume its responsibility for naming schools

B. ISSUE

When it is necessary to open new schools, the Board of Education must have an equitable process for naming those schools.

C. POSITION

1. It is the responsibility of the Board of Education to adopt official names for county public school facilities. In fulfilling this responsibility, the Board will make every effort to respect community preferences.

2. When a new school site is purchased, or a planning project for a new school is initiated, the superintendent will establish a temporary, generic name to designate the site or building for planning purposes. As a new school nears completion, the superintendent shall establish a process through which interested groups in the community which the school will serve may choose to retain the school's planning name or may recommend in priority order as many as three preferences for a new name.

3. It is preferred that schools be named for distinguished persons, no longer active in their careers, who have made an outstanding contribution to the community, county, state, or nation. The Board of Education will give strong consideration to names of women and minorities so that these are equitably represented among county school names.

4. Geographic names may also be considered for new schools. These names should be

clearly identifying, widely known, and recognized.

5. Although the Board will consider carefully community recommendations for school names, the final responsibility for officially naming a school building rests with the Board of Education.

D. DESIRED OUTCOME

An equitable process by which the Board of Education can assume its responsibility for naming schools

E. IMPLEMENTATION STRATEGIES

The superintendent will publish a regulation to implement this policy.

F. REVIEW AND REPORTING

This policy will be reviewed on an on-going basis in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 526-84, October 9, 1984; (reformatted in accordance with Resolution No. 333-86, June 12, 1986, and Resolution No. 458-86, August 12, 1986) amended by Resolution No. 419-90, June 25, 1990; amended by Resolution No. 256-90, April 17, 1990 (Codicil to School Naming Policy from April 18, 1990 through April 17, 1994.); amended by Resolution No. 97-96, February 13, 1996.

REGULATION MONTGOMERY COUNTY PUBLIC SCHOOLS

Related Entries: FFA
Responsible Office: Supportive Services
Facilities Management

Naming of Schools

I. PURPOSE

MCPS owned facilities are identified by names that represent a person or location in the county. This regulation sets forth the guidelines for identifying and deciding the name for an MCPS facility or for the naming of a portion of the building.

II. GUIDELINES

A. New Schools

1. Names of Distinguished Persons

It is preferred that schools be named for distinguished persons, no longer active in their careers, who have made an outstanding contribution to the community, county, state, or nation. The Board of Education will give strong consideration to names of women and minorities so that these are equitably represented among county school names.

2. Geographic Names

Geographic names may also be considered for new schools. These names should be clearly identifying, widely known, and recognized.

3. As a new school nears completion, the superintendent will assign the new school's principal or another administrator to chair a name-recommendation committee.

a) The committee will be comprised of PTA representatives from the attendance area that the new school will serve.

b) The committee will solicit input from neighborhood associations and relevant county agencies and organizations.

c) After careful deliberation, the committee will prepare a list of three recommendations that the superintendent will provide to the Board.

4. The Board will make the final decision on naming the new school.

B. Portions of Buildings

1. When a petition or request to name a section of a building is submitted to the local school principal, the petitioner will also be required to forward a copy to the Office of School Administration. The petition must include the following information:

   a) Name (proposed)

   b) Background data (rationale)

   c) Financial obligation and procedures

2. The principal will convene a selection committee of:

   a) Two students (nominated by the SGA president)

   b) Two teachers (selected by the principal)

   c) Two parents (nominated by the PTA)

   d) Three individuals from the community nominated by the Office of School Administration

   e) Principal (nonvoting chairman)

3. The committee shall acknowledge the receipt of the petition and inform the petitioners that prior to a decision the committee will be available to receive additional petitions regarding the topic. The chairman will provide a memorandum to appropriate organizations in the school community apprising them of the proposal. The issue will remain open 30 days in order to provide time for additional reactions and petitions.

4. The committee shall review all proposals and select the name and inform the Office of School Administration.

Administrative History: Formerly Regulation No. 230-5, revised October 1982; revised November 26, 1997.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FBA

Air Conditioning Policy

A. PURPOSE

To establish the process for providing air-conditioning to new and existing schools in order to support and carry out summer program activities in a more effective manner

B. PROCESS AND CONTENT

1. Each new school will be air-conditioned when initially constructed as this can be accomplished at little or no increase in cost per pupil housed because of the compact design features that are possible through the use of totally air-conditioned spaces.

2. All administrative and instructional media centers used for summer program activities will be air-conditioned.

3. To support summer program activities, spaces in existing schools will be air-conditioned in the most economical manner possible by:

   a) Determining through a feasibility study each time a capital budget is prepared which of the schools within each administrative area should be air-conditioned when the need cannot be met by a new school in the immediate future

   b) Considering and identifying air-conditioning requirements in close relationship to the projected and sustained need to house summer programs each time a major remodeling project is planned

4. As appropriate, bid invitations for major remodeling projects will include alternatives to determine the cost of providing air-conditioned spaces in existing schools so that comparative cost data may be obtained.

C. REVIEW AND REPORTING

This policy will be reviewed every three years in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 31-71, January 19, 1971; reformatted by Resolution No. 333-86, June 12, 1986, and Resolution No. 458-86, August 12, 1986, and accepted by Resolution No. 209-91, February 25, 1991.

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FAA

Modernization/Renovation

A. PURPOSE

To establish a facilities life-span process for Montgomery County Public Schools (MCPS) that addresses changing educational program standards and deteriorating physical conditions at reasonable cost while providing appropriate spaces for educational programs and services and maintaining a safe, secure, and healthy physical environment for students and staff

B. PROCESS AND CONTENT

1. Issue

Buildings, building components, and equipment all require various and continuing levels of maintenance to achieve their expected useful life. MCPS views maintenance as being on a continuum encompassing repairs, renovation, and modernization.

The Board of Education should determine when funds will be spent on aging school facilities:

a) To maintain the plant's existing physical capabilities

b) To renew building systems and/or site components by replacement or other means

c) To bring the facility up to current educational and building standards through either modernization or replacement because of an outdated educational environment or deteriorated building and site conditions

2. Background

Following a period of extensive school closures and consolidations in the 1970's and early 1980's, the Board of Education reactivated a capital program to schedule the systematic modernization of its aging schools still in operation. Closing more than 60 schools had eliminated many of those in the poorest condition, but the remaining

facilities built in the 1950's and 1960's have become 30-40 year old school facilities in the 1980's and 1990's, which are difficult and expensive to maintain.

The County Council has urged MCPS to consider whether schools must be modernized, or whether some, instead, could be renovated at a lower cost. The school system is committed to using its resources as efficiently as possible while providing an appropriate learning environment for all children. For these reasons, a step-by-step approach to the care and modification of facilities from the time of their construction will continue to be followed.

3. Applicable Laws, Rules, and Regulations

The first goal of the MCPS policy FAA: *Long-Range Educational Facilities Planning* is to provide the facilities necessary to sustain high quality educational programs at reasonable cost. Among the objectives of this policy are to consider the impact of facility changes on the delivery and equity of educational programs; to provide adequate school space to accommodate future improvements in educational programs and services to the extent these can be anticipated; and to recognize that "older school buildings must be renovated to continue their use on a cost-effective basis and that modernization to current educational program standards is necessary to maintain program quality."

State and county fire/life safety and health codes, national standards for accessibility for the physical handicapped, Department of General Service criteria for energy conservation, and applicable rules of State of Interagency Committee for School Construction must be considered when any changes to facilities are contemplated. The Annotated Code of Maryland and the Charter of Montgomery County require a comprehensive six-year program for capital improvements. State law requires each county board of education to "maintain throughout it s county a reasonably uniform system of public schools that is designed to provide quality education and equal education opportunity for all children." *(Annotated Code of Maryland, 4-107)*

4. Definitions

a) *Maintenance/Preventive and Routine Repairs* refers to, on a day-to-day basis, the ongoing upkeep of property and equipment that includes an annual physical assessment by school and area maintenance staff, as well as the repair and minor replacement activities necessary to support a safe and healthy environment.

b) *Renovation* is the design, construction, and equipping process through which a school facility and its systems are renewed and updated to meet county, state, and federal codes and requirements. An addition or major redesign of building spaces for program reasons is not included.

(1) *Local Capital Projects* are specific projects to restore and/or improve school environments for students, staff, and community. Examples are modifications for handicapped accessibility, space modifications for program, installation of ceiling fans, and school security systems. These are renovation-type projects that provide minor modifications to a facility to restore/continue its physical and educational functionality.

(2) *Planned Life-Cycle Asset Replacement (PLAR)* is the comprehensive replacement of key facility site components, based on age and condition, in order to anticipate and avoid potential failure, and to prolong the useful life of the facility. Related to PLAR projects are roof replacement and mechanical systems rehabilitation projects funded through the capital budget. These major maintenance projects are renovative in nature.

c) *Modernization* refers to the design, construction, and equipping process through which an aging school facility is brought up to current educational standards as established by MCPS, and through which its systems are renewed and updated to meet school, county, state, and federal codes and requirements. Modernization may require an addition or redesign of space to meet educational program requirements.

5. Continuum of Activities

To maintain and extend the life of facilities, MCPS initiate and follows a continuum of activities from the first day of new school occupancy. The timeliness shown in parenthesis are intended as suggestions and are not absolutes. The condition of the building will be the determining factor.

a) Maintenance/Preventive and Routine Repair (Occupancy-Onward)

Preventive maintenance is provided to ensure that a building component or item of equipment will achieve its expected useful life. This effort begins when the item is new and continues until it is replaced or modernized. Facilities receive regular operational care such as cleaning and maintenance of systems and finishes, lubricating, checking for proper operation, adjusting and aligning, and identifying items to be repaired or modified.

Preventive maintenance is accomplished by a team of electricians, plumbers, carpenters, heating mechanics, and general maintenance workers. The program is scheduled and directed by each maintenance trade. Schools and users are not expected to request preventive maintenance services. The program is staffed and funded through the operating budget of the Division of Maintenance.

Routine maintenance restores items and components to their normal operating condition. Planned repairs are made while the component is still operational to

avoid a breakdown. "Broken fix it" repairs may require immediate attention to prevent damage to other building or equipment components. Repairs are initiated by maintenance staff, preventive maintenance reports, manufacturers' recommendations, and school requests. Both planned and "broken fix it" repairs are funded from operating budget accounts.

b) Renovation

(1) Local Capital Projects (5-25 years)

Capital projects are scheduled that enhance, protect, or restore physical environment in schools. Recent examples include modifications to lights and windows to increase energy conservation, installation of ceiling fans in non-air-conditioned buildings, and replacement of identified environmental hazards such as contaminated plumbing systems. Minor modifications also may be made to existing spaces/components to allow the educational program or activity to operate effectively and efficiently. These capital projects are not intended, primarily, to lengthen the life of the facility and probably will not lessen the needs of facilities in the 30 year old range. School and area administrators and area maintenance staff identify these needs. These projects are funded through the capital budget.

(2) Major Maintenance (15 - 30 years)

The major maintenance program completely overhauls or replaces worn out building components. Based on annual maintenance requests submitted by principals, trade manufacturers' recommendations, and analyses by maintenance systems, a comprehensive, six year, school by school major maintenance plan is developed each fiscal year.

Facilities are evaluated and components scheduled for replacement. These include roofs, mechanical systems, and key facility components such as classroom and hallway lighting, floor surfaces, doors and partitions, as well as exterior asphalt, fields, fencing, and concrete. A replacement program (Planned Life Cycle Asset Replacement - PLAR) has been initiated to replace components that do not last 30 years. Major replacement projects are expected to extend the useful life of a facility and may reduce the overall needs of a 30 year old facility. For this reason, schools identified on the six year modernization schedule are excluded from replacement projects, such as PLAR, for the same period.

The program is funded through the capital budget and reduces impact on the operating budget because resources will not be applied to continuing costly routine repairs to worn out building components/equipment.

c) Modernization (30 Plus Years)

An evaluation of physical conditions and educational standards are reviewed along with long-term projections for schools in the 30 plus year old range. A ranking of facilities based on these factors is developed, with those schools most in need of educational and physical improvements assessed for estimated modernization costs. When previous capital projects at a school have impacted the scope of its anticipated modernization, these are identified. Base on life cycle cost analyses and unusual circumstances, it may be necessary to replace buildings. The department of school facilities and facilities planning develop this schedule. The superintendent will recommend and the Board of Education will approve and request fund for modernization projects for the six years of the Capital Improvements Program.

Public comment and testimony on the recommendations are provided through the MCPS annual capital budget and CIP process. Public comments on the Board-adopted request are directed to the County Executive and County Council.

E. REVIEW AND REPORTING

1. The superintendent, through the annual capital budget process, will review with the Board and the public which facility improvements have been accomplished through replacement or modernization projects. For schools identified as eligible for future modernization, an annual assessment will confirm or modify the previously adopted schedule based on physical condition, educational standards, enrollment projections, available funds, holding schools, surrounding planning issues, and other factors as appropriate.

2. Because schools identified for future modernization are excluded from other six-year construction/replacement projects, modernization projects are expected to move forward in a systematic manner based on assessment procedures. When extenuating circumstances are identified, a project may be moved forward, given priority consideration, or receive other unusual capital remedies until such time as modernization can occur.

3. This policy will be reviewed every three years in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 855-98, October 6, 1998

5015

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FBA, FBB, FMA

Elementary School Park Sites

WHEREAS, It is sometimes desirable, for purposes of economy, to locate elementary schools adjacent to park sites as developed by the Maryland-National Capital Park and Planning Commission so that the public interest may be better served through the joint use of land for the educational program in conjunction with community needs and recreational facilities; and

WHEREAS, The members of the Board of Education and the members of the Maryland-National Capital Park and Planning Commission as well as members of their staffs have discussed the school park concept; and

WHEREAS, The firm which recently completed a management survey of the school system's operations recommended that there is a need to purchase sites that better relate to the number of children enrolled in the school so that the site may accommodate a fully flexible educational program; and

WHEREAS, The joint staff report entitled Park Schools dated September 1963, recommended that a school park site should be at least eighteen acres in size in order to accommodate the joint use requirements for education and recreational activities; now, therefore, be it

Resolved, That the Superintendent continue to consult with appropriate staff members of Maryland-National Capital Park and Planning Commission to determine the location of school park sites so that a minimum area of eighteen acres can be acquired with the Board of Education taking title to approximately nine acres, the minimum area needed to accommodate the educational program where the school adjoins facilities and grounds of the Maryland-National Capital Park and Planning Commission; and be it further

Resolved, That the site utilization in the case of the school park sites be jointly agreed to by the staffs of the Board of Education and the Maryland-National Capital Park and Planning Commission; and be it further

Resolved, That this resolution be transmitted to the Maryland-National Capital Park and Planning Commission for its information and guidance.

Resolution No. 179-66, March 21, 1966

1 of 1

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FBA, FBB

Street and Road Construction Abutting School Sites

WHEREAS, Montgomery County has requested a reaffirmation of a policy relating to road construction adjacent to school sites, now therefore be it

Resolved, That the Board furnish a list of road and street projects which the Board of Education considers necessary for the opening and operation of new schools, as well as existing schools, and be it further

Resolved, That the Board of Education establish that in any contract made for the purpose of a school site it be stated, whenever appropriate, that Public Works of Montgomery County control street construction.

Resolution No. 143-59, January 28, 1959

POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: FBA, FBB, FMA, FMC

Policy on Landscaping

A. PURPOSE

To state the Board's position on the preparation of a landscape plan and on the implementation of the plan for new and existing schools

B. PROCESS AND CONTENT

1. Preparation of landscape plans is to be authorized for capital projects for each new school or additions to existing schools where a landscape plan has not been previously prepared. The landscape plan, which will be part of the working or detailed drawings, will be reviewed and approved by the staff prior to the release of the plan to the school and/or the Parent-Teacher Association.

2. A landscape plan will be provided for all schools for which no plans have been previously provided and for which no apparent capital project is anticipated, excepting those considered by the staff to be adequately landscaped.

3. In developing plans, maximum utilization should be made of all available services from related public agencies.

4. All proposals for screen planting and plans for conservation planting, where needed, will be included as part of the project specifications.

5. General landscaping will be implemented by the local school except for the screen and conservation planting.

C. REVIEW AND REPORTING

This policy will be reviewed every three years in accordance with the Board of Education policy review process.

Policy History: Adopted by Resolution No. 735-61, November 27, 1961; reformatted by Resolution No. 333-86, June 12, 1986, and Resolution No. 458-86, August 12, 1986, and accepted by Resolution No. 635-89, November 14, 1989.